

State Owned Companies in the European Gaming Market: Comparative Perspectives

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Abstract. This paper looks at different case studies of European lotteries operating games of chance for the public benefit. It takes the case studies of four national lotteries as most similar systems design comparative methodology to investigate the extent to which market structure and managerial strategy play a role in the profitability of the companies. The empirical data collected through process tracing, public statements and public records shows that while being bound to interact with each other, the market context does not dictate managerial strategies, and innovations in the latter offer very diverging results in terms of the bottom line of the different European lotteries operating games of chance. This paper contributes thus to the existing literature on market conditions for companies operating games of chance (e.g. Huttenen 2020, Grote & Matheson 2023, Clotfelter & Cook 1991) by developing a much-needed link to the academic literature on corporate governance in state-owned enterprises (e.g. Cao & Vittas 2017, Szarzec & Nowara 2017, Megginson & Netter 2019).

Keywords: State-Owned Enterprises, Lotteries, European Union, Sustainable Business Models

Introduction

The Romanian Lottery positions itself as a national brand, which offers the opportunity of a life change to all Romanians, regardless of age, education and status, through the continuous investment of profits in prizes, in social responsibility projects. With a history of more than 117 years, the credibility of the brand lies in the earnings offered and the projects in which the company is involved. Lottery Games: 6/49, 5/40, Noroc, Noroc plus, Super Noroc, Joker, Loz, PronoSport, Prono-s, Video Loterie, Loterie pasivă. The games organized by the Romanian Lottery are available in over 37,700 physical locations throughout the country (lotto agents, partner locations or physical points and sales terminals, as well as through street vendors. From 2023, part of the Romanian Lottery games (6/49, 5/40, Joker) are also available online, through partner applications. 6/49: The most popular lottery game, with the most consistent prizes awarded over time. This state owned enterprise is also engaged in sponsorships, for supporting social causes, sports, promotion of a healthy lifestyle etc.

The digitalization of lotteries involves the transformation of traditional lottery systems into digital platforms, often accessible via websites or mobile applications. This transition brings several advantages and changes to the landscape of lottery operations. Firstly, it can increase the accessibility. Digital lotteries make it easier for people to participate. Players can buy tickets, check results, and claim prizes from the convenience of their homes using their computers or mobile devices. Secondly, it allows for an expanded reach in the market. By going digital, lotteries can reach a broader audience beyond their physical locations. This can include players from different regions or even different countries, depending on the regulations. Digitalisation can also improve security. Digital platforms can enhance security measures to prevent fraud and ensure fair play. Features like encryption, secure payment gateways, and random number generators can bolster trust in the system. Digitalisation also improves efficiency in processes. Digital lotteries streamline

the ticket purchasing process, reducing the need for manual handling of tickets and paperwork. This efficiency can lead to cost savings and faster processing times for players.

Innovative Features for such a digital transformation also include digital platforms that allow for the integration of various features to enhance the user experience. This can include options like automatic number selection, subscription services, and personalized notifications. Other data insights are also possible, as digital lotteries can gather data on player behavior and preferences, providing valuable insights for marketing strategies and product development.

However, as digitalization also can involve a larger energy consumption, and a lower control over consumer age, there are also questions of social responsibility. Digital platforms can also facilitate responsible gaming measures by providing resources for players to set limits on spending, self-exclude if necessary, and access support services for problem gambling. As technology evolves, digital lotteries can adapt more easily to emerging trends such as blockchain-based lotteries or the integration of augmented reality for interactive experiences.

The digitalization of lotteries also poses challenges, including cybersecurity risks, regulatory compliance, and ensuring equitable access for all players, especially those without internet access or digital literacy skills. Additionally, some players may prefer the traditional experience of purchasing tickets from physical locations. Balancing innovation with the preservation of trust and integrity is crucial for the successful digitalization of lotteries.

Literature review

The literature on the management of state-owned companies offers ample examples of best practice procedures – from the legislative framework, to the management structure, or the means of monitoring and evaluating performance (OECD 2021, Cao & Vittas 2017, IMF 2019). However, a very important dimension in the management of state companies is the one related to decision-making transparency (OECD 2021, IMF 2017). This dimension is all the more important as the literature highlights the mechanisms of capturing public resources through and from state companies (IMF 2019, Volintiru et al 2018, Innes 2014). Another dimension of interest in the study of state-owned companies comes from the area of management studies, analyzing the efficiency of their administration (Szarzec & Nowara 2017, Megginson & Netter 2019).

Both for issues related to lack of transparency and the risk of corruption, as well as those related to lack of managerial efficiency, the present study tests the hypothesis of the positive impact of digitization. A number of studies analyze this dimension of digitization in the current context worldwide (Petrova et al 2022), but few directly cover the digitization strategy in State companies. This assumption is counterintuitive in the context where most state-owned companies serve labour-intensive operations – they have many employees, or cover services and public goods that are difficult to transfer to the digital area.

H1: The more actively a state-owned company pursues a digitization strategy, the more organizational processes are efficient.

H2: The more actively a state-owned company pursues a digitization strategy, the more transparent are its organizational processes.

H3: The more actively a state-owned company pursues a digitization strategy, the more competitive compared to private competitors.

This doctoral research project aims to fill a gap in the specialized literature most publications about state-owned companies in recent years come from the area of “literature gray”— of the reports of international organizations. The lack of access to empirical data means that

academic articles in specialist journals to be much less numerous. Of also, the case study of the gambling sector, makes the case study of the strategy of survival and adaptation of a state-owned company all the more relevant to the few analyses existing on such competitions (Lampiranta 2023, Huttunen 2020, Grote & Matheson 2013, Kingma 2006).

State-owned companies that are lottery operators are usually profitable companies. However, the profitability of national lottery operators may vary depending on various factors, including market size, types of games offered, pricing structures, costs operational and regulatory frameworks (Huttenen 2020, Grote & Matheson 2023, Clotfelter & Cook 1991). While some national lottery operators can generate significant profits, others may experience challenges or operate on a financial balance. Profitability can be influenced by factors such as popularity and demand for lottery games, effectiveness marketing and sales strategies, operational efficiency, regulatory environment and competition from other gambling options (Wood & Clapham 2005). Furthermore, responsible gaming measures and regulations can also affect profitability, as they often aim to find a balance between generating income and protecting players against excessive gambling (Kingma 2006, Lampiranta 2023). It is important to noted that the main purpose of national lotteries is usually not maximization profit, but generating funds for certain public purposes, such as supporting social programs (Kindt & McCrary 2000, Gulley & Scott 2005, Hayer & Meyer 2011). This study will trace these factors through the case study of the State Lottery Company National from Romania, as well as that of other European Lotteries.

Methodology

The author should make references to some previous research similar to the present one, if that is the case. Also, the author should mention the software programs used for processing statistical data, if it is the case.

For this research thesis, I propose to use a mixed methodology, which will consist of both quantitative and qualitative tools.

Quantitative analysis will involve statistical data on digitization levels, the impact of digital transformation on economic efficiency, cost reduction, adaptability to market changes, optimization of production processes, improvement of customer experience, etc.

The qualitative analysis will involve in-depth interviews, which will target the chosen case studies and selected industries, the most relevant in the context of digital transformations.

Following the case studies, the transformations that have occurred in the respective sectors will be characterized based on statistical data, and a series of qualitative analyzes will be made on the perception and strategic orientation.

Based on the interviews, I will be able to compare the strategies and policies of the respective companies, as well as the effect of the implementation or non-implementation of digitization projects within the organizations and identify which are the most relevant transformations within state-owned companies in the gambling sector.

As a method, I will use a systematic comparison method, through which I will also use MMSD (most similar systems design), to understand what are the factors that create differences in these similar industries, but also cluster analysis, for to better compare these practices.

Case Studies

Case Study No.1 – Romania - "Loteria Română" S.A.

The Romanian Lottery positions itself as a national brand, which offers the opportunity of a life change to all Romanians, regardless of age, education and status, through the continuous investment of profits in prizes, in social responsibility projects.

Lottery Games:

1. **6/49:** The most popular lottery game, with the most consistent prizes awarded over time.

Prizes are offered for 3 categories.

The Loto 6/49 game is a lotto-type game, in which the numbers from which the participants choose the ones they play are between 1 and 49, a simple version with 6 numbers.

The game principles for this system are the same as for other lotto games, customizing to 6 numbers out of 49.

The drawing of the winning numbers is done by drawing 6 numbers from the urn, giving the participants 4 categories of winnings, as follows:

Category 1 – the player gets all his 6 chosen numbers drawn;

Category 2 – 5 numbers from the 6 drawn;

Category 3 – 4 numbers out of the 6 drawn;

Category 4 – 3 numbers from the 6 drawn;

The price of a game ticket is 7.5 lei (~1.5 Eur) The draws take place twice a week, on Thursdays and Sundays.

2. **5/40:** Loto 5/40 is part of the Romanian Lottery's product portfolio since 1995.

In this game, participants must play 5 (or more) numbers between 1 and 40, and to win they must "guess" 5 or 4 numbers among the 6 drawn when drawing the winning numbers.

The categories of winnings at LOTO 5/40 are the following:

Category 1 – the player gets all his 5 chosen numbers drawn;

Category 2 – 5 numbers from all 6 numbers drawn;

Category 3 – 4 numbers from all 6 numbers drawn;

The price of the game ticket is 4.5 lei (~0.9 Eur) The draws take place twice a week, on Thursdays and Sundays.

3. **Joker:** Joker is the LOTO game that is part of the Romanian Lottery product portfolio since 2000. Participation in this game is done by choosing two sets of numbers: 5 or more, between 1 and 45 and one or more, between 1 and 20.

The draw consists of 5+1 numbers, drawn from the same two fields (1-45, respectively 1-20), more precisely two sets that only together form the winning version: one of 5 numbers and one of a single number.

The categories of earnings at JOKER are the following:

Category 1 – all 5 numbers from the first set and the JOKER;

Category 2 – all 5 numbers from the 5 of the first set;

Category 3 – any 4 numbers from the 5 of the first set and the JOKER;

Category 4 – any 4 numbers from the 5 of the first set;

Category 5 – any 3 numbers from the 5 of the first set and the JOKER;

Category 6 – any 3 numbers from the 5 of the first set;

Category 7 – any 2 numbers from the 5 of the first set and the JOKER;

Category 8 – any number from the 5 of the first set and the JOKER. The price of a game ticket is 6.5 lei (~1.3 Eur).

4. **Scratch Cards/Tickets:** a traditional lotto game with purely random searches of numbers and/or symbols. The Romanian Lottery is constantly launching different types of Scratch cards in various forms of presentation (staple ticket, random ticket, scratch ticket, etc.). The Romanian Lottery offers an exhaustive variety of lottery tickets.

The winnings put into play through lottery tickets vary, starting from the value of the price per lottery ticket up to amounts of 1,000,000 lei.

5. **Pronosport:** a game of sports predictions regarding the results of the matches included in the contest schedule established each time by the Romanian Lottery, matches that are usually part of the Italian championship, series A. The contest schedule includes 13 matches.

The participants in this game are asked to indicate the forecast for each of the matches included in the PRONOSPORT contest program, on special tickets.

In the PRONOSPORT games, prizes are awarded in three categories:

Category 1 – for tickets in which the player nails 13 results;

Category 2 – for 12 results;

Category 3 – for 11 results;

Prices: the price of a simple version for the 100% participation quota is 20.00 lei (~approx. 4 Eur).

6. **Video Lottery:** The game is played through video lottery terminals connected in a closed circuit national network. The winnings are designated in the video lottery system, randomly and automatically, by the network of terminals and become possible at any time, once the minimum necessary ceiling of participation in the game is met.

The value of the jackpot increases with the number of participants in the game, and the national Video Jackpot Lottery network consists of several thousand available terminals.

The value of a game credit is 0.1 lei.

Sponsorships: Supporting social causes, sports, promotion of a healthy lifestyle etc.

Online visibility: The website offers information about the operation of the company, the organization and rules of the games, results, information of public interest, news and official communiqués.

The official website offers links to the partner platforms through which players can access some of the games organized by the Romanian Lottery. <https://www.loto.ro/>.

The company is communicating on most of the Social Media platforms: Facebook, Instagram, LinkedIn.

Facebook:

- 45k followers
- daily posts
- diversified content (games news, results, winnings and winners, video, foto etc)

Instagram:

- 3.1 k Followers
- daily posts
- diversified content (foto, video)

LinkedIn:

- 124 followers
- occasional posts

Case Study No.2 – France - *La Française des Jeux (FDJ)*

The French company that holds the monopoly in organizing the majority of games of chance and sports betting.

The games the French Lottery is offering are Euro Millions-My Million, Joker+, Loto, Keno Gagnant a vie, and Amigo.

The French National Lottery, the forerunner of the FDJ, was created in 1933 to help soldiers wounded in the First World War.

Since 2000, FDJ also has an online presence.

In 2004, the company adopted the Euromillions game

In 2019, FDJ was privatized by listing on the stock exchange. Currently, the company has 400,000 shareholders.

Lottery

The lottery, which includes draw games and instant games, generated a revenue of 1,916 million euros in 2022. Sports betting and online games.

Sports betting and online gaming, where there is competition, generated €467 million in revenue in 2022.

Adjacent activities

Adjacent activities (international, payment services, entertainment) generated revenue of €78 million in 2022.

Organized games: EuroDreams, EuroMillions, Lotto, illiko, Bingo Live, Keno.

The company also organizes **Poker games and Sports Betting**.

Investments of over 250 million euros in IT systems between 2015-2020.

Three related activities - services for other sports betting operators (FDJ Gaming Solutions), development of games with international partners and entertainment - competitions, advertising, organization of virtual reality games and escape rooms.

Lottery Games:

1. **Loto Oficial:** is the French equivalent of the 6/49 game organized by Loteria Romana.

It is one of the most popular lottery games in France. Players select a series of numbers and can win prizes based on the number of numbers matched. Loto is a popular lottery. Players choose six numbers from a sequence and try to win a jackpot by guessing all six numbers correctly.

There are also prizes for players who correctly guess part of the numbers.

The biggest jackpot ever won in the French Lotto was €30 million. This record jackpot prize was won on December 4, 2021.

The price of a game ticket is 2.20 Eur.

2. **EuroMillions** it is one of the few lottery games played in several European countries, including France and 8 other countries. This cooperation between different countries makes it unique.

The participation of several countries allows EuroMillions jackpots to reach unprecedented levels, often much higher than France's national lotto. For example, it can increase to 240 million.

Euro Millions is a popular lottery that offers several winning possibilities.

In France, players can choose the "My Millions Raffle" option in addition to standard tickets. It's a variant that makes it possible to win €1 million in the Tuesday and Friday Euro Millions draws from 20.45 CET.

In the French Eurolotto, players must select five main numbers from a range of 1 to 50 and two "lucky star" numbers from a separate range of 1 to 12.

To win the jackpot, all seven numbers selected must match the drawn numbers.

There are also prizes for players who correctly guess part of the numbers.

3. **EuroDreams** is a lottery numbers game where players from participating European countries play to win a top prize that is paid out in regular installments over a period of 30 years. Choose 6 numbers from 1 to 40 and a dream number from 1 to 5.

EuroDreams is played in eight countries, namely Ireland, Austria, Belgium, France, Luxembourg, Portugal, Spain and Switzerland.

The price of a game ticket is 2.5 Eur.

4. **Illiko** it is the equivalent of scratch-off games (lotteries) organized by the Romanian Lottery.

FDJ offers for Illiko both the possibility of playing physically, through scratch cards, as well as online.

The company offers 67 Illiko games.

The prices for a game ticket start from 0.5 Eur.

5. **Bingo Live** is a drawing game that can be played with one or more players.

On FDJ.fr, it has been present since 2009 and is added to the other online games offered by this site.

The costs of participating in the Live Bingo Games are 0.5 euro, 1 euro or 2 euro.

To play, each player has a card with a grid that has 25 numbers between 1 and 75. The combination of numbers on each card is unique.

To win, the players must tick either a line on the game board or the entire grid.

Bingo winnings are highly variable as they depend on certain conditions.

In general, they can vary from the value of the bet up to 2000 euros FDJ organizes 9 bingo games

6. **Keno** is a lottery game where 20 out of 70 balls are drawn from the range 1 to 70.

Players bet by choosing numbers between 1 and (usually) 80. After all players have placed their bets, 20 numbers (some variants draw fewer numbers) are drawn at random, either by a ball machine similar to those used for the lottery and bingo, either with a random number generator.

Players can bet between 1 and 10 Euros.

The player is paid based on how many numbers have been picked (either the player's selection or the terminal picking the numbers), the number of matches between the picks and the bet.

Online visibility:

Dedicated platform for online gaming - Website <https://www.fdj.fr/>.

Business info & CSR campaigns, partnerships and communication targeted to shareholders etc.

Info website <https://www.groupefdj.com/en/>.

The company is communicating on most of the Social Media platforms: X (Twitter), Facebook, Instagram, YouTube, LinkedIn.

Facebook:

- 311 k Followers;
- Only video posts;
- Engagement through different campaigns;
- Actively connected with the sports world – constantly posting about sportsmen;
- Videos and animations with prizes;
- Responsible gaming insertion on every post;
- Predefined chat messages;
- Short copies for posts;
- Specially designed websites for games or campaigns www.lesjeuxenfete-fdj.fr;

- Social inclusion campaigns in partnerships with TV and other media: <https://www.facebook.com/hashtag/duoday2023>;
- VR games promotion.

Instagram:

23.7 k Followers;

- separate photo collections on different topics – games, campaigns etc.;
- Longer description of photos and videos.

LinkedIn:

- 41.7 k followers;

- Daily posting on topics such as partnerships and campaigns.

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Case Study No.3 – Italy – SuperEnalotto

In Italy, the Super Italian Lottery company organizes the following lottery games:

- SuperEnalotto;
- Superstar;
- Gratta e Vinci Games (scratch games);
- Sivince Tutto Lottery;
- MillionDay Daily Lottery;

Each of the games has a dedicated website for online gaming.

1. SuperEnalotto is the successor to another lottery known as "Enalotto". The origins of this organization actually date back to the 1950s.

In 1997 Enalotto becomes „SuperEnalotto” - <https://www.superenalotto.com/en/>.

The price of a game ticket is 2 Eur. With this, the player has 3 chances to win.

The player chooses 6 numbers in the range 1-90. For each guessed number, prizes start from 0.75 Eur up to the Jackpot prize.

The draws take place on Tuesday, Thursday and Saturday.

2. SuperStar

The SuperStar game was introduced on March 28, 2006 to provide more chances to win prizes. It is the equivalent of the Noroc game of the Romanian Lottery.

To participate, players must select a number between 1 and 90. A SuperStar number is drawn during each SuperEnalotto draw.

As this number is drawn from a different urn than the six main SuperEnalotto winning numbers, it is possible that the same number will be drawn in both the main draw and the SuperStar draw.

3. Gratta e Vinci - <https://www.grattaevinci.com/>

It is the equivalent of scratch-off games.

It can also be played online.

Prices start from 0.5 Euro, up to 25 Euro.

The maximum prize is 6 million Euros.

There are 51 lottery tickets available.

4. Sivince Tutto Lottery - <https://www.sivincetutto.it/>

SiVinceTutto is a lottery with games held every Wednesday at 20:00 CET where all prize money for the draw must be won, even if there is no jackpot winner.

The game offers a total of five prize levels, with prizes awarded for matching two or more numbers.

Each participation in the game costs 5 Euros.

The player chooses 12 numbers between 1 and 90.

SiVinceTutto has a total of five prize levels, with overall odds of winning a prize of approximately 1 in 6.

Prizes can be won by matching two or more numbers, with the jackpot prize available to players who match all six numbers.

5. MillionDay Daily Lottery -

https://www.golotter.com/ro/loto-online/italia-millionday/?tl_affid=8028&ft=5&chan=super

In MillionDay, players have to choose five numbers between 1 and 55, and every day there is a draw where five numbers are randomly drawn.

To win the jackpot, all five numbers chosen must match the numbers drawn.

There are also smaller prize categories where players can win prizes by correctly guessing just one, two, three or four numbers.

The jackpot is worth 1 million Euros.

The site has a version in Romanian!

Online visibility:

Each game has it's own website.

No solid Social media presence.

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Case Study No.4 – Spain – SELAE

Sociedad Estado Loterías y Apuestas del Estado („State Society for State Lotteries and Wagers”, SELAE) is a Spanish state company. Assigned to the Spanish Ministry of Finance, it is responsible for the management, operation and marketing of all types of lotteries and games of chance at national level or whenever they exceed the scope of a region. The company was established in 1984 as State Lottery, as a result of the integration of the services that until then administered state games — the Mutual Sports Betting Office and the National Lottery Service — and was last reformed in 2010.

It assumes all the powers of the State in the matter lottery, an activity promoted by the State since 1763, when King Charles III created the Royal Lottery.

Since 1812, it has also managed the Christmas Lottery, the largest lottery drawn worldwide.

SELAE is the organizer of the most famous Lottery game – El Gordo.

Games:

- LaPrimitiva - Weekly game;
- ElGordo de laPrimitiva - Weekly game;
- ElGordo de Navidad – Special Christmas game organized each year on December 22nd;
- ElGordo del Nino – organized each year in January;
- San Ildefonso – Summer Spanish lottery;
- ElGordo Nacional Extra - Monthly lottery game;
- EuroMillones;
- BonoLoto;
- LA QUINIELLA;
- EL GUINIGOL;
- LOTOTURF QUINTUPLE PLUS;
- Eurodreams.

Online visibility:

Website have a multi-language versions and links to dedicated websites for each game.

Social Media :

Facebook

- 70 k Followers;
- Multiple daily posts;
- little diversification of content (links, winner photos);
- Prizes and games etc.

YouTube

- 29.3k followers;
- occasional videos;
- game tutorials.

Case Study No.5 – Greece – OPAP - Greek Organisation of Football Prognostics S.A.

OPAP is today the most important national gambling company in Greece and one of the most famous worldwide. The company was founded in 1958 as the national lottery of Greece and was listed on the Athens Stock Exchange in 2001. In the 90s, the first public lotteries appeared: Loto, Tzoker, Pro Lotto, Pro PoGoal.T.

The company holds the exclusive rights to organize and manage numerical lotteries and sports betting in the territory of Greece. For many years OPAP was a state gambling monopoly. In 2013, the company's privatization was completed by selling the state's remaining 33% stake to the Emma Delta investment scheme.

(<https://www.emmacapital.cz/cs/clanky/emma-delta-completes-acquisition-of-greeces-opap-betting-group>)

- In April 2015 the company launched opapp, its first smartphone application.

The OPAP website can not be accessed from Romania

Activities:

OPAP has five subsidiaries: OPAP Cyprus Ltd, which operates lottery agencies in Cyprus; OPAP SPORTS Ltd (f/k/a OPAP Glory and Glory Sports Betting) which operates sports betting agencies in Cyprus; OPAP International Ltd, OPAP Investment Ltd and OPAP Services S.A., Hellenic Lotteries and Horse races

OPAP organizes games such as:

- PRO-PO (since 1959);
- LOTO (Since 1990);
- TZOKER (Since 1990);
- PROTO (Din 10 iunie 1992);
- PROPOGOAL (Since 1996);
- PAME STOIXIMA (Since 2000; in 2014 the company's digital sports betting platform was launched, allowing players to bet online in Pame Stoixima and participate in the live betting games offered);
- SUPER 3 (since 2002);
- EXTRA 5 (since 2002);
- KINO (since 2004);
- PAME STOIXIMA VIRTUAL SPORTS (since 2017);
- POWERSPIN (since 2020).

Online visibility:

OPAP website is not accessible from Romania.

Social Media

Facebook

- 196 k Followers;
- Daily multiple posts;
- diversified content (foto, video, lives);
- posts about prizes etc.

Instagram

- not accessible from Romania.

LinkedIn

- 64 k followers;
- daily posts, employer branding, CSR, job ads

Case Study No.6 – **Hungary – Szerencsejáték**

Szerencsejáték- Hungarian State-owned lottery is;

- The 19th largest revenue generating company in Hungary;
- Games, lottery, sports betting.

They have an online application with over 7,700 points of sale and 1,700 employees, of which 10% (170) are disabled.

It started on January 1, 1991. Between May 22, 2022-December 31, 2026, it is under the PM's office.

They celebrated 20 years of the lottery with a big outdoor concert and made playgrounds for children with book signs and games

On their website there are dedicated spaces for stories of the winners.

Special addiction prevention program <https://www.maradjonjatek.hu/> - partnership with a church organization and the psychology institute for the prevention of gaming addiction, prevention program for schoolchildren, camps/prevention course in schools and colleges, therapy group, etc.

Games:

1. Lottery of 5;
2. Six Lottery;
3. Scandinavian Lottery;
4. EuroJackpot;
5. Luxor;
6. Joker;
7. Bets;
8. Horse races;
9. Scratch tickets;

Online visibility:

Website - <https://www.szerencsejatek.hu> .

The Hungarian State-owned lottery's website is characterized by a solid structure, with games that can be accessed online, with suitable visuals and Newsletters.

Social Media

Instagram

19.8 k Followers;

- Stories;
- Attractive visuals;
- news and info;
- Animes and Games.

LinkedIn

- 9 k followers;

- constant posts, employer branding, CSR, job ads.

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Case Study No.7 – Slovenia – Loterija Slovenije

The Slovenian Lottery - Loterija Slovenije combines the organization of gambling and the collection of funds to finance disability, humanitarian and sports organizations.

It operates on a concession basis, under strictly regulated conditions established by the state.

It has a shareholding structure that includes both the Slovenian state and capital funds, employee associations and NGOs.

Established in 1890, as part of the Serbian State Lottery.

Games:

1. **Loto:** <https://e.loterija.si/games/loto/play/classic-combo/start>;
2. **Eurojackpot:** <https://e.loterija.si/games/eurojackpot/play/classic/start>;
3. **Vikinglotto:** <https://e.loterija.si/games/vikinglotto/play/classic/start>;
4. **Tikitaka:** <https://e.loterija.si/games/tikitaka/play/classic/start>;
5. **3x3:** <https://e.loterija.si/games/three-x-three/play/quick/start>;
6. **Video Loterie:** <https://e.loterija.si/games/gambling>;
7. **Scratch tickets:** <https://srecke.loterija.si/>.

All games can be accessed online at the Website: <https://www.loterija.si/>.

Results and discussions

Analyzing the seven case studies on state owned lotteries in seven EU countries, presented in this article, we can observe that despite the traditional character of their activities, they tend to adapt to the modern times, and embrace the new trend in business which has already been embraced by the private sector, namely online presence. Of the seven analyzed lotteries, all have a more or less visible presence in the online environment, offering players the full or only partial experience of the game offer.

Case Study No.	Country	Games Offer	Online Games Offer	Social Media Presence (no. of platforms)
1	Romania	6	3	3
2	France	6	6	3
3	Italy	5	5	2
4	Spain	12	12	2
5	Grece	11	-	3
6	Hungary	9	9	2
7	Slovenia	7	7	-

The embracing of online game experience offered to players is a constant in EU countries, because it is shown in the studies that the state-owned lotteries in western and central Europe offer their players the whole experience, both in classic locations and online, the entire offer of games being accessible at a click away. Romanian National Lottery, it's the only one that offers their players only part of the games online due to the fact that it is in full digitalization process, a process that started as the first step with the players' access to the main traditional lotto games offered by the company, and in the future will offer a complete experience, similar to the lotteries in the EU.

The presence in the in the online environment does not consist only in offering the company's products online, but also implies a continuous presence on social media, something confirmed by the seven case studies, which present an active presence of state-owned lotteries on social media, on at least two platforms, which indicates on the one hand a desire to actively communicate with players and on the other hand a need to remain visible and relevant in the online environment.

Conclusion

At the EU level, state-owned lotteries are in a continuous struggle to offer players the same satisfaction, experiences and sameness that they can find in private gambling companies. Thus, they are obliged to keep up with the private sector, and to continuously upgrade themselves, even if this means embracing and conquering the online, without which they can become irrelevant. Even if in some cases, such as the case of Romania (Compania Nationala Loteria Romana), the online market penetration process is at the beginning, the results generated confirm the need for a strong online presence, in other cases where the online presence is already very visible, this generates both business opportunities and the notoriety of the company.

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